



BEAR Form 2018

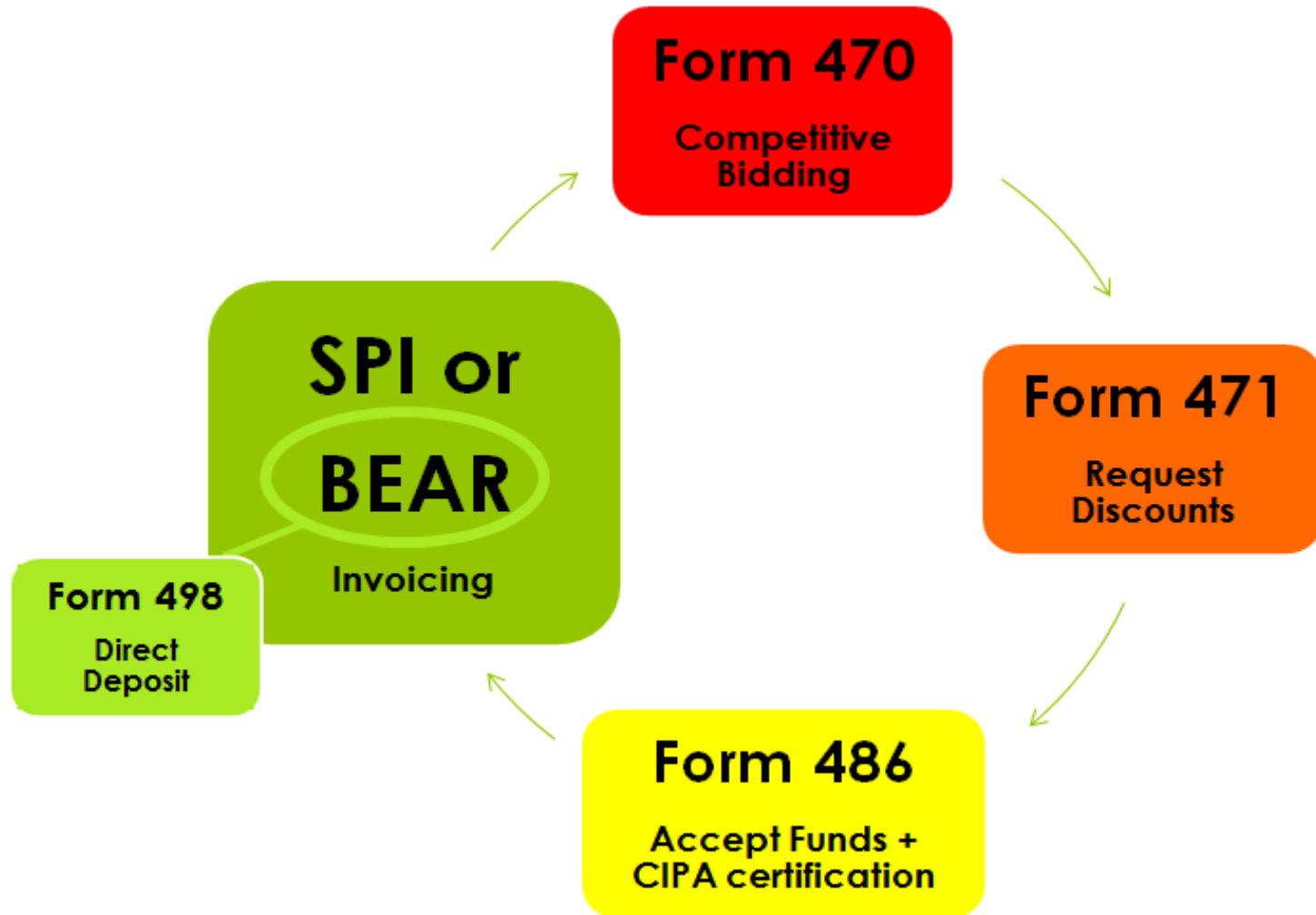
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Kentucky Department for
Libraries & Archives
April 28, 2018

The BEAR, Briefly

A brown bear is shown in profile, facing right, in a field of tall grass and yellow wildflowers. The bear's head is slightly raised, and its mouth is open, showing its teeth. The background is a soft-focus field of similar vegetation.

- **BEAR = Billed Entity Applicant Reimbursement**
- **Libraries file BEAR forms after paying the full invoice upfront**
- **Reimbursement via direct deposit**
- **No more paper BEAR forms can be submitted**
- **Service providers no longer certify BEAR forms**

E-rate Cycle



Deadlines—Recurring Services

BEAR forms are due no later than 120 days after the last date of service.

- For **recurring services such as internet or phone**, the last day of service is generally **June 30th** and the last date to invoice is **October 28th**. If October 28th falls on a weekend, the deadline is usually moved to the Monday after.
- **Invoicing deadline for FY 2017-18 recurring services** (July 1, 2017 to June 30, 2018) : **October 29, 2018.**
- **Invoicing deadline for FY 2018-19 recurring services** (July 1, 2018 to June 30, 2019) : **October 28, 2019.**

Deadlines—One-Time Purchases

You must complete invoicing no later than 120 days after the last date of service.

- For **non-recurring, one-time purchases such as Category Two equipment**, the last day to purchase/install is September 30th after the funding year and the last date to invoice is **January 28th after the funding year**. If January 28th falls on a weekend, the deadline is usually moved to the Monday after.
 - Invoicing deadline for FY 2017-18 one-time purchases: **January 28, 2019**.
 - Invoicing deadline for FY 2018-19 one-time purchases: **January 28, 2020**.

BEAR Tips

- **BEARs can't be filed until bills have been paid.**
- **BEARs can't be filed without the library's Form 498 ID** – this ID # provides direct deposit information.
- **File BEARs as frequently** (annually, quarterly, etc.) **as you like.**
- **Can list only 1 service provider on each form**
- **You can request 1 filing extension of 120 days:**
<http://www.usac.org/sl/applicants/step06/inv-extensions.aspx>
- **Vendor must also have a Service Provider Annual Certification form (also called SPAC/Form 473) on file for the relevant funding year before BEARs can be submitted.**

BEARs by the Numbers

- **You need the following to file a BEAR:**
 - **Identifying information:**
 - Billed Entity Number (BEN)
 - Your PIN for online forms (see next 2 slides)
 - Library's Form 498 ID (9 digits, starts 443) – appears on a drop-down on the form
 - **Funding request information:**
 - Form 471 number
 - Funding Request Number (FRN)
 - Invoice Dates
 - Eligible invoiced amount
- **This information will appear on your Funding Commitment Decision Letter (FCDL) or can be researched on E-rate Central—enter your BEN on this page:** <https://tools.e-ratecentral.com/us/stateInformation.asp?state=KY>

Which Funding Year?

- The Form 471 application number and the Funding Request Numbers (FRNs) include a hint to which funding year they involve:
 - Numbers for **FY 2017-18** start 17:
 - Form 471: **171**023913
 - FRN: **1799**050158
 - Numbers for **FY 2018-19** start 18:
 - Form 471: **181**033221
 - FRN: **1899**063645

PINs (1/2)

- Every library staff member who will prepare or certify BEAR forms must have their own **Personal Identification Number**—PINs are specific to the person. Logging in with a PIN certifies that you are the person associated with that PIN.
- **If you still have a PIN from previous years, continue using it. If you had a PIN but lost it**, contact the USAC Client Services Bureau at 1-888-203-8100 to ask for your PIN to be regenerated.
- To change or disable a PIN, use this page:
<https://slpin.universalservice.org/Pin/PinArea.aspx>


PINs (2/2)

- **To request a PIN for the first time**, contact the USAC Client Services Bureau, M-F, 8:00 a.m. to 8:00 p.m.
 - Phone: 1-888-203-8100
 - **E-rate Productivity Center** – from My Landing Page, click on the ‘Contact Us’ link; submit a completed PIN request template from the PIN page of the USAC website: <http://www.usac.org/sl/tools/forms/pin.aspx>
- Info you’ll need
 - Library name + Billed Entity Number
 - Full name, job title, and email of BEAR filer
 - Street address where PIN will be mailed
- New PINs are usually received within 2-3 weeks via regular US mail. Sometimes PINs are emailed when major invoicing deadlines are near.

Form 472 (BEAR) walkthrough

Note – 3 examples for how to fill out Block 2 are included


Online BEAR Login



USAC
Universal Service Administrative Company

Helping Keep Americans Connected

[Need Help?](#)



Applicant Login:

BEN:

128825

PIN:

.....

Email:

lauren.abner@ky.gov

Last Name:

Abner

Login

[Terms and Conditions of PIN Usage](#)

<https://www2.sl.universalservice.org/bear/login.aspx>

Block 1: Header Information

Helping Keep Americans Connected

[BEAR Home](#) [New BEAR Form](#) [Track Form](#) [Bulk Download](#) [Terms and Conditions](#) [Logout](#)

Add BEAR Invoice

Applicant Form Identifier

Enter a nickname for your reference.

Block 1: Header Information [Need Help?](#)

1. Billed Entity Name <input type="text" value="PUBLIC LIBRARY"/>	2. Billed Entity Number <input type="text" value=""/>	3. Service Provider Identification Number (SPIN) <input type="text" value="143666666"/>	Service Provider Name SLD Interim
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Applicant FCC Form 498 ID
443666666

4. Contact Name

5. Contact Telephone Phone
() - ext.

Contact Fax
() -

Contact Email

Once you enter the SPIN, your service provider's name will pop up.

Enter your contact information. Email is the preferred method.

6. Total Reimbursement Amount
(total from Block 2, Column 14)
\$ 0.00

Your library's Form 498 ID(s) will appear on this drop-down once banking information has been validated.

Block 2: Line Item Information

Block 2, Example #1 – reporting the full amount charged for a recurring service during the entire funding year

Block 2: Line Item Information Per Funding Request Number

[Need Help?](#)

7. FCC Form 471 Application Number (from Funding Commitment Decision Letter)	8. Funding Request Number (FRN) (from Funding Commitment Decision Letter)	9. Bill Frequency	10. Customer Billed Date	11. Shipping date to Customer or Last Day of Work Performed (mm/dd/yyyy)	12. Total (Undiscounted) Amount for Service	13. Discount Rate	14. Discount Amount Billed to USAC (Column 12 multiplied by Column 13)
1) 171 [REDACTED]	1799 [REDACTED]	MONTHLY ▾	7/1/2017		5700	90	5130.00



[Add Line Item](#)

#7 – Form 471 application number

#8 – Funding Request Number (FRN)

#9 – Select the billing frequency from the drop-down. Recurring usually = Monthly.

#10 – Enter the first date of the Funding Year (usually July 1)

#11 – leave blank (always leave this field blank for recurring services)

#12 – Enter the total eligible, undiscounted amount for the service billed on that FRN –
remember that internet service and voice service will have separate FRNs

#14 – the form will automatically calculate the refund

Block 2: Line Item Information

Block 2, Example #2 – recurring services reported periodically during the funding year – list each monthly invoice as a line item

Block 2: Line Item Information Per Funding Request Number

[Need Help?](#)

7. FCC Form 471 Application Number (from Funding Commitment Decision Letter)	8. Funding Request Number (FRN) (from Funding Commitment Decision Letter)	9. Bill Frequency	10. Customer Billed Date	11. Shipping date to Customer or Last Day of Work Performed (mm/dd/yyyy)	12. Total (Undiscounted) Amount for Service	13. Discount Rate	14. Discount Amount Billed to USAC (Column 12 multiplied by Column 13)	
1) 171 [REDACTED]	1799 [REDACTED]	MONTHLY ▾	7/1/2017 		475	90	427.50	
2) 171 [REDACTED]	1799 [REDACTED]	MONTHLY ▾	8/1/2017 		475	90	427.50	

Click on
this
button to
Add Line
Item

[Add Line Item](#)

#7 – Form 471 application number

#8 – Funding Request Number (FRN)

#9 – Select the billing frequency from the drop-down. Recurring usually = Monthly.

#10 – For a July invoice, enter 7/1/YYYY. For an August invoice, enter 8/1/YYYY, etc.

#11 – **leave blank (always leave this field blank for recurring services)**

#12 – Enter the total eligible, undiscounted amount on the invoice – **remember that internet service and voice service will have separate FRNs**

#14 – the form will automatically calculate the refund for each line item; the total for the entire form will be listed under Block 1

Block 2: Line Item Information

Block 2, Example #3 – one-time, non-recurring services – usually Category Two equipment purchases

Block 2: Line Item Information Per Funding Request Number

[Need Help?](#)

7. FCC Form 471 Application Number (from Funding Commitment Decision Letter)	8. Funding Request Number (FRN) (from Funding Commitment Decision Letter)	9. Bill Frequency	10. Customer Billed Date	11. Shipping date to Customer or Last Day of Work Performed (mm/dd/yyyy)	12. Total (Undiscounted) Amount for Service	13. Discount Rate	14. Discount Amount Billed to USAC (Column 12 multiplied by Column 13)
1) 1		ONE-TIM		1/15/2017	1525	80	1220.00

[Add Line Item](#)

#7 – Form 471 application number

#8 – Funding Request Number (FRN)

#9 – Select the billing frequency from the drop-down. Non-recurring = one-time.

#10 – leave blank (always leave this field blank for non-recurring services)

#11 – Enter that last date you were invoiced for purchase related to this FRN – if you received multiple invoices, list only the last date. For early Cat2 purchases, list July 1.

#12 – Enter the total eligible, undiscounted amount for the service billed on that FRN (may include charges from multiple invoices)

#14 – the form will automatically calculate the refund

Block 3: Billed Entity Certification

Block 3: Billed Entity Certification

[Need Help?](#)

I declare under penalty of perjury that the foregoing is true and correct and that I am authorized to submit this Billed Entity Applicant Reimbursement Form on behalf of the eligible schools, libraries, or consortia of those entities represented on this Form, and I certify to the best of my knowledge, information and belief, as follows:

- ☒ **A.** The discount amounts listed in this Billed Entity Applicant Reimbursement Form represent charges for eligible services and/or equipment delivered to and used by eligible schools, libraries, or consortia of those entities for educational purposes, on or after the service start date reported on the associated FCC Form 486.
- ☒ **B.** The discount amounts listed in this Billed Entity Applicant Reimbursement Form were already billed by the Service Provider and paid for by the Billed Entity Applicant on behalf of eligible schools, libraries, and consortia of those entities.
- ☒ **C.** The discount amounts listed in this Billed Entity Applicant Reimbursement Form are for eligible services and/or equipment approved by the Fund Administrator pursuant to a Funding Commitment Decision Letter (FCDL).
- ☒ **D.** I acknowledge that I may be audited pursuant to this application and will retain for at least 10 years (or whatever retention period is required by the rules in effect at the time of this certification), after the latter of the last day of the applicable funding year or the service delivery deadline for the funding request any and all records that I rely upon to complete this form.
- ☒ **E.** I certify that, in addition to the foregoing, this Billed Entity Applicant is in compliance with the rules and orders governing the schools and libraries universal service support program, and I acknowledge that failure to be in compliance and remain in compliance with those rules and orders may result in the denial of discount funding and/or cancellation of funding commitments. I acknowledge that failure to comply with the rules and orders governing the schools and libraries universal service support program could result in civil or criminal prosecution by law enforcement authorities.

Check all of these certifications.

Contact Information

Contact Information for Billed Entity Authorized Person:

To certify the form, #15 must be checked.

15. Signature ☒

By logging into your account using your PIN, checking this box, and clicking the "certify" button at the end of the form, you have electronically signed the form. You are reminded that an electronic signature is the same as a handwritten signature on the form. To see a copy of the Terms and Conditions to which you previously agreed, please click on the "Terms and Conditions" menu above.

16. Date 4/26/2018

17. Name LAUREN ABNER
18. Title/Position Technology Consultant
20. Address 1 PO Box 537
Address 2 300 Coffee Tree Rd.
City Frankfort
State KY
Zip Code 40602 -

19. Phone Number (502) 564 - 1728 ext.
19a. Fax Number () - ext.
19b. Email
19c. Name of Authorized Person's Employer LAUREN.ABNER@KY.GOV
KDLA

An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number.

Clear Save **Certify and Submit**

Enter your contact information and click on Certify and Submit. You also have the option to Save the form and return to it later.

Invoicing Review

- USAC requests additional review on as many as 50% of BEAR forms filed.
- You have 7 days to respond to invoice review emails or the BEAR will be rejected—you'd have to file a new BEAR in that case. Example email request:

From: [REDACTED] Patrick <[REDACTED]@sl.universalservice.org>
Sent: Friday, March 31, 2017 10:59 AM
Subject: Invoice Needed for SLD Invoice 255
To: [REDACTED]

SLD Invoice No	SP_App Invoice No	Line ID	Customer Ship Date	471	FRN	SPIN	Service Provider Name	Applicant Name	BEN	Undiscounted Amt	Discounted Amt
255 [REDACTED]	2016-cat2	851 [REDACTED]	30-Jan-17	161 [REDACTED]	169 [REDACTED]	143005588	CDW Government LLC	[REDACTED] PUBLIC LIBRARY	128 [REDACTED]	[REDACTED]	[REDACTED]

I am reviewing your request for reimbursement of the invoice lines noted above.

BILLS:

Please submit:

- I. A copy of the summary page/s for the bill/s sent to Applicant, to show:
 - a. Bill Date / Ship Date,
 - b. Service Provider Name,

In USAC emails, SLD Invoice No = BEAR form number

Remittance Statement

Once USAC finishes review of your BEAR form, the library's Remittance Contact (listed on Form 498) will receive an email statement showing how much will be disbursed. The deposit will be made within a week of the email.

YOUR E-RATE PROGRAM REMITTANCE STATEMENT: 443 [REDACTED]

Abner, Lauren (KDLA)



Helping Keep Americans Connected | www.usac.org

SCHOOLS AND LIBRARIES BEAR PROGRAM REMITTANCE STATEMENT
AS OF OCTOBER 27, 2016

Attn: [REDACTED]
[REDACTED] Public Library

RE: FCC Form 498 ID 443 [REDACTED]

This notice provides an explanation of your entity's Billed Entity Applicant Reimbursement (BEAR) payment for the following invoices.

Approved

10/27/2016 143001192 AT&T Corp. [REDACTED] 2016-JanToJune \$3,274.02
Applicant Name: [REDACTED] LIBRARY;SLD Invoice Number:245 [REDACTED];BEAR
Letter Date:10/27/2016;Line Item Detail Number:824 [REDACTED];Amount
Requested:7817.58;Partial Paymnt, Inv > Remaining Commitment;1201;

Total Approved Disbursement \$3,274.02

Total Actual Disbursement: \$3,274.02

Records Retention

- Remember to print a copy of any BEARs you submit and the invoices from your service providers.
- The current E-rate retention period is 10 years after the last date for service in the funding year.
- If you're selected for a random audit, you may have to produce these records—accuracy and documentation are key!

Questions?

- **Lauren Abner**, KDLA's Technology Consultant:
 - lauren.abner@ky.gov
 - (502) 564-1728
- **USAC Client Service Bureau:**
 - 1-888-203-8100
 - File a customer service case in the [E-rate Productivity Center](#) (EPC)